

1. Document Options:

- a. Edit:
 - i. Java Edit Panel
- b. Save:
 - i. Save as a corporate document
 - 1. Saved in Repository (central storage location)
 - ii. Save as a personal document
 - 1. Saved on WebI server, under user profile folder
 - iii. Save to my computer
 - 1. MS Excel
 - 2. PDF
 - 3. CSV
- c. Send:
 - i. Send document to other users (within group)
- d. Printing (View in PDF Format):
 - i. View the document in PDF format
 - ii. Recommended way for printing
- e. Add to My InfoView:
 - i. Allows you to add document to My InfoView and view it in your personalized portal
 - ii. You can add documents from the Corporate Documents, and Personal Documents pages, including non-Business Objects documents
- f. Refresh:
 - i. Refresh the report for latest data
- g. Close:
 - i. Close the report and go back to Home
- h. Document Map
 - i. Document map that allows you to jump from section-to-section or report-to-report
- i. Show mapping base on the sections
- j. Prompt
 - i. Show the prompt
 - ii. Could select the different value

2. Editing Report:

Allows you to format the report; modifications made at this level will not affect the SQL.

- a. Manager Pane
 - i. Data
 - ii. Templates
 - 1. Reports Elements
 - a. Report
 - b. Tables
 - i. Horizontal Table
 - ii. Vertical Table
 - iii. Crosstab
 - iv. Form
 - iii. Properties
 - 1. Different for different parts of reports. For instance, section, cells ...
 - a. Format
 - b. Properties
 - c. Page Layout
 - d. Alerters
 - e. Filter
 - f. Break
 - iv. Document Map
- b. Filter Pane
 - i. Allows to add filter at report level
- c. Undo
 - i. Allows you to cancel the previous formatting modification
- d. Alerters
 - i. Allows you to create, modify, or apply alerters to report cells

- ii. Alerts activate conditional formatting on report cells where results meet the conditions you specify – *same as Excel Conditional Formatting*
- e. Filter
 - i. Allows you to create a filter by selecting a value from a list of values
 - ii. This button is activated if you select an object on the result
- f. Break
 - i. Allows you to insert or remove a break on a table column or row
- g. Sorting Order
 - i. Allows you to apply the sorting order on a table
- h. Calculation
 - i. Allows you to apply particular calculation on the selected cell
- i. Insert Cell
 - i. Insert a cell
- j. Page Layout
 - i. Toggles between Page Layout and Normal views of the current report
- k. View Structure
 - i. Allows you to make multiple modifications to reports and preview your modifications without implementing the changes on the WebIntelligence server
 - ii. View Result
 - 1. Results View implements the modifications and displays the values and formatting on the report tables and chart
- l. Drill
- m. Refresh Data
- n. Purge Data
 - i. Removes the data from the document, but the document structure (reports, tables, charts and so on) is retained. This enables you to minimize the document size
- o. Tour/Help
- p. Save Document
 - i. Save as a corporate document
 - 1. Saved in Repository (central storage location)
 - ii. Save as a personal document
 - 1. Saved on WebI server, under user profile folder
 - iii. Save to my computer
 - 1. MS Excel
 - 2. PDF
- q. Export to PDF for Printing
- r. Allows you to generate a copy of individual reports or specific pages to a PDF format file for printing

3. Other Advance Features:

- a. Multiple report views within a report
- b. Multiple queries in a report
- c. Adding rows and columns
- d. Use of formulas to create custom variables and calculations in reports
- e. Charts
- f. Free-Standing Cells